



USDA TURKEY MARKET NEWS REPORT

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Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The trade sentiment was mostly steady on frozen hens and consumer sized toms for current shipments, steady to fully steady for deferred with some spot unsettledness noted. Frozen whole turkey interest was light for current shipment, moderate for November holiday needs. Fresh whole turkey activity was noted for Easter needs. Trading centered on frozen private labels with price ceilings noted on hens for May at 58.50-59.50 and increasing to July at 60.50-61.50 cents delivered. The price ceilings on the toms ranged from 56.50 for May to 58.50 cents delivered July. Offerings were generally adequate with most sellers reluctant to discount product. The undertone on tom bulk parts was steady to instances firm and fresh white meat steady to fully steady. Bulk parts and meat trading light.

EXPORT MARKET HIGHLIGHTS

Trading centered on a heavy volume of frozen thigh meat and on light to fair volumes of tom parts. Demand continued light in the West due to concerns over Newcastle, fair to instances good in the Midwest and East with interest centered drums, thigh meat and mechanically separated turkey.



WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **MARCH 06, 2003**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	60-62	60-61	60.47	466.5	62.00	321.6	APR	-	-
CENTRAL REGION 4/	60-62	60	60.00	40	63.00	321.6	MAY	1240	MAR-JUN
WESTERN REGION 5/	61-62	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	57.5-59	57.5-59	57.97	202.2	58.50	138.9	APR	-	-
CENTRAL REGION 4/	58-59	-	-	-	60.00	138.9	MAY	1600	MAR-JUN
WESTERN REGION 5/	58-59	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **MARCH 07, 2003**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	60-62	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	60-62	-	-	-	-	-	-	880	MAY-JULY
WESTERN REGION 5/	61-62	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	57.5-59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	58-59	-	-	-	-	-	-	360	MAY-JULY
WESTERN REGION 5/	58-59	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK OF MAR 7, 2003	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	60.47	61.50 **	59.00 **
CENTRAL REGION	60.00	60.31	57.75 **
WESTERN REGION	61.50 **	61.50 **	59.70 **
16-24 LB TOMS			
EASTERN REGION	57.97	59.00 **	55.70 **
CENTRAL REGION	58.50 **	58.00	54.20 **
WESTERN REGION	58.50 **	57.00	55.70 **

**BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	65-66
FROZEN TURKEYS Y TOMS 14-24#	63
FROZEN TURKEYS Y TOMS 24-28#	65-72

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	115-129
TURKEYS Y TOMS UNDER 22#	115-125
TURKEYS Y TOMS 22-24#	115-125
TURKEYS Y TOMS 24-26#	115-129
TURKEYS Y TOMS 26 LBS & OVER	115-129

**FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION
CENTS PER POUND, WEEK OF 10-MAR-2003**

	(8-16#)	(16-24#)	
	HENS	LBS TOMS	LBS
	<u>PRICE</u>	<u>(000)</u>	<u>PRICE</u> (000)
SALES (PROMOTIONS INCLUDED)	68.20	100	64.46 13
SALES (PROMOTIONS NOT INCLUDED)	68.20	100	64.46 13
SALES (PROMOTIONS ONLY)			
SALES (PRICE TO BE DETERMINED)			

**TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)
SLAUGHTER-CERTIFIED RTC TURKEYS**

JANUARY	444,767*
FEBRUARY 1-28, 2003	401,381*
To date 2003	846,148*
To date 2002	839,166*

*PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTSBY GEOGRAPHICAL AREAS WEEK ENDING 01-Mar-2003
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

		<u>YOUNG TURKEYS</u>		<u>TOTAL TURKEYS</u>	
		PCT	AVG	OLD	AVG
		CHG	LIVE	BANDED	LIVE
-THOUSAND HEAD-	PW	WT	-THOUSAND HEAD-	WT	
N EAST	809	27	21.62	(A)	815 21.62
SATL	809	-1	29.09	(A)	815 29.09
N CENT	2,101	-3	32.56	(A)	2,107 32.56
S CENT	456	3	21.49	(A)	462 21.49
WEST	298	7	23.10	(A)	303 23.10
U.S. TOTAL	4,473(B)	3	28.18	29	4,502 28.18
TO-DATE					
2003	38,153(B)			125	38,278
TO-DATE					
2002	39,178(B)			75	39,253

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 61,000; for the year 513,000; last year to date 353,000.

LIVE TURKEYS SLAUGHTERED

W/E 01-Mar-2003

	YOUNG		YOUNG	OLD	TOTAL
	HENS	TOMS	BREEDERS		
	<u>THOUSANDS</u>				
HEAD	1,793	2,619	61	29	4,502
AVG WT	15.72	36.82	24.76	26.29	28.18
LAST WEEK	1,668	2,606	76	17	4,367
SAME WK YR AGO	1,775	2,660	33	11	4,479
AVG WT	16.36	36.09	24.85	28.54	28.16
TO-DATE/2003	14,860	22,780	513	125	38,278
TO-DATE/2002	15,411	23,414	353	75	39,253

**USDA, AMS, POULTRY PROGRAMS,
POULTRY MARKET NEWS OFFICES**

Washington, DC	Voice	(202)720-6911	Michael Sheats
	Fax	(202)720-2403	(Chief)
Atlanta, GA	Voice	(404)562-5850	Johnny Freeman
	Fax	(404)562-5875	(Officer-In-Charge)
	Recorded	(404)562-5856	
Jackson, MS	Voice	(601)965-4662	Gary Brown
	Fax	(601)965-4661	(Southern States Area Supervisor)
Des Moines, IA	Voice	(515)284-4471	Mary L. Adkins
	Fax	(515)284-4468	(Officer-In-Charge)
	Recorded	(515)284-4545	
Bell, CA	Voice	(323)269-4154	Jim Derby
	Fax	(323)269-5926	(Officer-In-Charge)
	Recorded	(323)260-4676	

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 6 MARCH 2003.

Trade sentiment on fresh white meat was steady to instances firm with scapula and wing meat in the strongest positions. Some sellers are reluctant to offer out fresh tom breast meat at current price levels, however, some isolated buyer cautiousness was noted for prompt shipments. Fresh white meat offerings ranged from tight on wing meat to sometimes adequate on fresh tom breast meat. The trade sentiment on frozen white meat ranged from steady to fully steady on frozen wing meat to mixed on frozen tom breast meat to barely steady on breast trim. Inquiry was light to instances fair with the best interest noted on wing meat. Frozen white meat offerings from new production were light and generally held with confidence, older supplies continued available for some items with some sellers more willing than others to find homes for excess inventories.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		T	94.00	160
BREASTS, 4-8 LBS GRADE A—FRESH 2/	154.00		154.00	20
BREASTS, 4-8 LBS PLANT GRADE 2/	88.00		88.00	40
DRUMSTICKS, TOM		T	21.00	6
DRUMSTICKS, TOM—FRESH				
DRUMSTICKS, HEN		W	17.00	120
WINGS, FULL-CUT, TOM	16.50		16.50	40
WINGS, FULL-CUT, HEN				
WINGS, V-TYPE, TOM		W	24.00	40
WINGS, V-TYPE, HEN		R	56.00	20
NECKS, TOM	19.00-21.00		20.33	60
NECKS, HEN				
BREASTS, B/S, TOM 3/		F	99.00	600
BREASTS, B/S, TOM—FRESH 3/	115.00		115.00	40
THIGH MEAT	48.00		48.00	160
THIGH MEAT—FRESH		W	53.00	40
BREAST TRIM MEAT				
SCAPULA MEAT		M	63.00	40
TENDERLOINS				
DESTRAPPED TENDERS		F	103.00	40
DESTRAPPED TENDERS—FRESH		W	115.00	20
WING MEAT WITH SKIN		W	49.00	20
MECHANICALLY SEPARATED 4/		F	16.00	20
MECHANICALLY SEPARATED—FRESH 4/	16.00-18.00		17.00	80

EXPORT TRADING

DRUMSTICKS, TOMS		T	23.00	120
WINGS FULL-CUT - TOMS		F	23.00	120
WINGS, V-TYPE, TOM		T	25.00	104
TAILS		R	20.25	80
MECHANICALLY SEPARATED 4/	18.00		18.00	40
THIGH MEAT - FROZEN		W	47.53	300

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins. 4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 7 MARCH 2003.

The undertone on tom necks and drums ranged from steady in the West to instances firm in the Midwest and East, fully steady on tom 2-joint wings. The tom full-cut wing undertone was mostly steady with instances of both strength and weakness noted in some parts of the country. The undertone on hen parts was at mostly steady on wings and drums, steady to barely steady on necks. Demand on bulk parts ranged from being active in the Midwest and East on tom necks and tom drums to being slow on hen necks. Offerings of tom drums and necks were tight in the Midwest and East with some buyers drawing supplies from the West. Offerings of tom full-cut wings were mostly light to adequate with some product trading at lower prices due to lack of freight. Offerings of hen parts ranged from instances burdensome on necks to light on hen 2-joint wings. Domestic trading centered on light volumes of tom bulk parts and fresh mechanically separated turkey (MST). Plant grade basted 20-22 lb. breasts 115, fresh wing meat with skin 50 and fresh scapula 63 cents delivered domestic. Export trading centered on a heavy volume of frozen thigh meat and on fair volumes of tom parts. For export: frozen MST +30 days age 12, young hen necks 13, fresh thigh meat 54, ground drum meat 45 cents delivered.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY	
					WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		T	94.00	160	94.00	160
BREASTS, 4-8 LBS GRADE A—FRESH 2/	146.00		146.00	20	150.00	40
BREASTS, 4-8 LBS PLANT GRADE 2/		R	88.00	40	88.00	40
DRUMSTICKS, TOM	21.00-24.00		22.80	146	22.73	152
DRUMSTICKS, TOM—FRESH						
DRUMSTICKS, HEN	20.00		20.00	20	17.43	140
WINGS, FULL-CUT, TOM	16.00-18.00		16.83	240	16.79	287
WINGS, FULL-CUT, HEN	17.00		17.00	20	17.00	20
WINGS, V-TYPE, TOM	24.00		24.00	10	23.90	100
WINGS, V-TYPE, HEN						
NECKS, TOM	18.00-22.00		20.00	200	19.89	413
NECKS, HEN						
BREASTS, B/S, TOM 3/	99.00		99.00	160	99.00	160
BREASTS, B/S, TOM—FRESH 3/	113.00-115.00		114.20	100	114.58	190
THIGH MEAT	50.00-51.00		50.98	82	49.01	242
THIGH MEAT—FRESH	53.00-55.00		54.50	152	54.19	192
BREAST TRIM MEAT						
SCAPULA MEAT	62.00-63.00		62.50	80	62.67	120
TENDERLOINS						
DESTRAPPED TENDERS		F	103.00	40		
DESTRAPPED TENDERS—FRESH	114.00-116.00		114.57	88	114.65	108
WING MEAT WITH SKIN	47.00		47.00	40	45.80	100
MECHANICALLY SEPARATED 4/		F	16.00	20		
MECHANICALLY SEPARATED—FRESH 4/	15.50-18.00		16.50	264	16.53	424
EXPORT TRADING						
DRUMSTICKS, TOMS	21.00-23.00		21.48	384	21.58	624
WINGS FULL-CUT - TOMS	14.00-16.00		14.32	248	14.32	248
WINGS, V-TYPE, TOM		T	25.00	104	25.00	104
TAILS	19.00		19.00	80	19.00	80
MECHANICALLY SEPARATED 4/	14.00-15.00		14.50	416	14.81	456
THIGH MEAT - FROZEN	44.00-61.00		49.04	932	48.85	1,352

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.